Grant Workshop

Congressman Geoff Davis

Enclosures:
- Two letters inviting constituents to join the Grant Workshop
- Grant Workshop RSVP Form
- Press Releases
- Thank You letter for attending Grant Workshop

Found at www.gopsecretary.gov:
- Grant Workshop Packet

- Agenda
- List of Speakers
- Copy of PowerPoint Presentation
- Copy of The Catalog of Federal Domestic Assistance Website
- List of helpful websites
- Evaluation Form

- Directory of Federal Agencies
- Directory of Federal Departments
- Directory of Non-Governmental Organizations
- Faith-Based Offices in Federal Agencies
- Glossary

GEOFF DAVIS
4TH DISTRICT, KENTUCKY

ASSISTANT MAJORITY WHIP

WASHINGTON, DC OFFICE:
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WASHINGTON, DC 20515
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Congress of the United States
House of Representatives
Washington, DC 20515

COMMITTEE ON ARMED SERVICES
SUBCOMMITTEE ON STRATEGIC FORCES

SUBCOMMITTEE ON TERRORISM,
UNCONVENTIONAL THREATS AND CAPABILITIES

COMMITTEE ON FINANCIAL SERVICES
SUBCOMMITTEE ON CAPITAL MARKETS, INSURANCE,
AND GOVERNMENT SPONSORED ENTERPRISES

SUBCOMMITTEE ON HOUSING AND
COMMUNITY OPPORTUNITY

SUBCOMMITTEE ON OVERSIGHT AND INVESTIGATIONS

November 10, 2005

«Prefix» «First» «Last»
«Title»
«Organization»
«Street1»
«Street2»
«City», «State» «Zip»

«Salutation»

I would like to invite you or a delegate of the «agencyname» to participate as a speaker at a grant workshop I am hosting on Monday, October 17, 2005, from 11 a.m. to 5:00 p.m. in Northern Kentucky. This workshop will feature representatives from federal and state agencies, as well as private foundations. The purpose of this meeting is to provide my constituents with information regarding funding opportunities as well as information on the grant process. This will be accomplished through panel discussions and breakout sessions.

Please contact Jennifer Biggy of my Ft. Mitchell staff with any questions you have regarding this request. Jennifer can be reached at (859) 426-0080. I sincerely appreciate your review of my request and your assistance in providing my constituents with the information and tools they need to maximize all grant opportunities available to them.

Sincerely,

Geoff Davis
Member of Congress

GD/«initials»

FORT MITCHELL OFFICE:
277 BUTTERMILK PIKE
FORT MITCHELL, KY 41017
PHONE: (859) 426-0080
FAX: (859) 426-0061

ASHLAND OFFICE:
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ASHLAND, KY 41101
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FAX: (606) 325-9866

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4th District, Kentucky

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House of Representatives
Washington, DC 20515
November 10, 2005

COMMITTEE ON ARMED SERVICES
Subcommittee on Strategic Forces

Subcommittee on Terrorism,
Unconventional Threats and Capabilities

COMMITTEE ON FINANCIAL SERVICES
Subcommittee on Capital Markets, Insurance,
and Government Sponsored Enterprises

Subcommittee on Housing and
Community Opportunity

Subcommittee on Oversight and Investigations

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«Organization»
«Street1»
«Street2»
«City», «State» «Zip»

«Salutation»

I am hosting a grant workshop in the near future, and I would be honored if you could attend. I am planning this workshop to help individuals and organizations develop the skills to write successful grant applications. It is my desire to maximize grant funding for worthy projects in Kentucky's 4th District.

The workshop will be held on October 17, 2005, from 11:00 a.m. until 5:00 p.m. at Receptions in Erlanger, Kentucky. This workshop will feature representatives from federal and state agencies, as well as private foundations, who will provide information on funding opportunities and helpful hints on the grant application process.

Enclosed you will find an agenda and RSVP form for the event. If you plan to attend the October 17th Grant Workshop, I ask that you RSVP by October 10, 2005. You may return this form by faxing it to (859) 426-0061 or mailing it to 277 Buttermilk Pike, Ft. Mitchell, Kentucky 41017. Please return one RSVP form for each attendee. This will help me accommodate everyone who wishes to attend.

I hope you will join me for this free event. Any questions about the workshop or other information on grant-related services offered by my office may be addressed to Jennifer Schmidt at (859) 426-0080.

Sincerely,

Geoff Davis
Member of Congress

GD/«initials»
Enclosure

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Ashland, KY 41101
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GEOFF DAVIS
4TH DISTRICT, KENTUCKY

_____

ASSISTANT MAJORITY WHIP

_____

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COMMITTEE ON ARMED SERVICES
SUBCOMMITTEE ON STRATEGIC FORCES

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Congress of the United States
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Congressman Geoff Davis' Grant Workshop
RSVP Form

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_____ I will be able to attend the October 17, 2005 grant workshop in Erlanger, Kentucky

Name of Participant _____

Affiliation   _____

Address   _____

City, State, Zip   _____

Telephone Number _____

Please select one of the following federal agency breakout sessions:

_____ Appalachian Regional Commission/ Economic Development Agency / EPA / USDA Rural Development
_____ U.S. Department of Education
_____ U.S. Department of Housing and Urban Development / USDA Rural Development
_____ U.S. Department of Health and Human Services
_____ U.S. Department of Justice Offices / U.S. Department of Homeland Security
_____ National Endowment for the Arts / National Endowment for the Humanities

Please select one of the following state agency breakout sessions:

_____ Kentucky Arts Council / Kentucky Humanities Council
_____ Kentucky Department of Education
_____ Kentucky Office of Homeland Security
_____ Kentucky Housing Corporation
_____ Governor's Office of Local Development / Kentucky Infrastructure Authority
_____ Kentucky Justice Cabinet

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4TH DISTRICT, KENTUCKY

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November 10, 2005

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«Salutation»

Thank you for attending our first grants workshop at Receptions in Erlanger on October 17th. I was pleased to see so many individuals and groups from all parts of Kentucky's 4th District in attendance.

I hope the presentations and printed materials provided will help you reach your grant funding goals. The evaluation forms completed by participants will be very helpful to us as we review the workshop and make plans for future events. We will use these evaluations to enhance the events and services offered by our office in the future. I am grateful, not only for your attendance and participation, but also for your comments and suggestions that will help us enhance our grants services.

My office is often notified of grants opportunities that may interest you. We are working to create an email distribution list to quickly alert you to federal grants for which your organization may be eligible to apply. If you are interested in this email distribution list, please email Jennifer in my Fort Mitchell office at jennifer.biggy@mail.house.gov to sign up.

Please include your email address, as well as the types of grants and federal funding that most interests you. Choices include the United States Departments of Agriculture, Interior, Justice, Labor, Education, Housing and Urban Development, Homeland Security, and Health and Human Services. You also may list the National Endowment for the Arts, National Endowment for the Humanities, Appalachian Regional Commission, Economic Development Administration, and Environmental Protection Agency. If you are unsure of which agencies to choose, please call Jennifer for guidance at (859) 426-0080.

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My staff and I are committed to providing full-service grants assistance. It is our goal to maximize grant funding for worthy projects in Kentucky's 4th District. We will be contacting you in the future to alert you to additional workshops and other events that may be useful.

Thank you again for participating in our first grants workshop. Please don't hesitate to contact me anytime I may be of assistance.

Sincerely,

Geoff Davis
Member of Congress

GD/«initials»

Congressman Geoff Davis

www.geoffdavis.house.gov

Congressman Geoff Davis hosts
Grant Workshop

WASHINGTON, D.C. – Congressman Geoff Davis will host a grant workshop Monday, Oct. 17, to help maximize grant opportunities for worthy projects in Kentucky's Fourth District.

The workshop will feature representatives from federal and state agencies as well as private foundations to provide information and helpful tips on the grant application process. Davis' Fort Mitchell office has assisted several agencies and groups in the Fourth District this year that were looking to secure grants.

"It is a pleasure for me to be able to bring together experts from so many federal and state agencies as well as private and corporate foundations. The grant-writing process can be daunting, especially for someone who is not familiar with it," Davis said. "I want to make sure organizations in the Fourth District have every opportunity to maximize grant funding and seek out opportunities they might not know existed. The Fourth District should take advantage of grant funding to realize our dream of making our region among the best places to live and raise a family."

The workshop will include presentations on the basics of grant writing, leveraging non-cash assets and grants development for nonprofits. The afternoon will feature breakout sessions with:

- Appalachian Regional Commission, Economic Development Agency, Environmental Protection Agency and USDA Rural Development;

- U.S. Departments of Education, Housing and Urban Development, Health and Human Services, Justice and Homeland Security;

- National Endowment for the Arts and National Endowment for the Humanities;

- Kentucky Arts Council and Kentucky Humanities Council, Inc.;

- Kentucky Department of Education, Office of Homeland Security and Housing Corporation;

- Kentucky Governor's Office of Local Development, Kentucky Infrastructure Authority and Kentucky Justice Cabinet;

- Toyota, Citigroup Foundation, Ashland, Inc., 5/3 Bank and UPS Foundation.

Registration begins at 10:30 a.m.; Davis will address attendees at 11 a.m. Breakout sessions will take place in the afternoon:

- Federal agencies from 1 to 1:45 p.m.;

- State agencies from 2 to 2:45 p.m.

- Private and corporate foundations panel discussion from 3 to 4 p.m.

The workshop concludes at 5:15 p.m.

Those interested in attending must RSVP by Monday, Oct. 10 by calling the Fort Mitchell District Office at 859-426-0080. The workshop will be held at Receptions, 1379 Donaldson Road, Erlanger.

Media is invited to cover the workshop; inquiries should be directed to Jessica R. Towhey at 202-226-6824.

-ee-

Congressman Geoff Davis

www.geoffdavis.house.gov

Congressman Geoff Davis hosts first-of-its-kind Grants Workshop

*Nearly 400 people from local governments, nonprofit and
other organizations attended to learn how to secure grants*

ERLANGER, KY – Congressman Geoff Davis hosted a Grants Workshop in Erlanger
that drew nearly 400 representatives of local governments, nonprofits and other
organizations interested in learning how to write grants and learning more about applying
for federal, state and private grant funding.

Monday's workshop, which Davis hopes to host on a regular basis, is the first of its kind
in Northern Kentucky. Representatives from more than 20 federal and state agencies, as
well as private and corporate foundations, spoke with the attendees about how to target
grants specific to their organizations. Among the participants were:

- Appalachian Regional Commission, Economic Development Administration, Environmental Protection Agency and USDA Rural Development;

- U.S. Departments of Education, Housing and Urban Development, Health and Human Services, Justice and Homeland Security;

- National Endowment for the Arts and National Endowment for the Humanities;

- Kentucky Arts Council and Kentucky Humanities Council, Inc.;

- Kentucky Department of Education, Office of Homeland Security and Housing Corporation;

- Kentucky Governor's Office of Local Development, Kentucky Infrastructure Authority and Kentucky Justice Cabinet;

- Toyota, Citigroup Foundation, Ashland, Inc., 5/3 Bank and UPS Foundation.

"When it comes to bringing money into Kentucky's Fourth District for worthy projects, I
want to make sure we have every opportunity and advantage on our side," Davis said "An

amazing amount of work went into making this happen, and I was pleased to bring to Northern Kentucky representatives of these government agencies and private organizations. I believe it is important to educate our communities on how to maximize grant funding. I hope to make this a regular event to continue that education and information sharing."

PHOTO COURTESY OF REP. DAVIS' OFFICE:
Rep. Geoff Davis addresses the nearly 400 representatives of Fourth District government agencies, school districts and other groups who attended the first grants workshop held in Northern Kentucky. The workshop featured speakers from more than 20 federal and state agencies as well as private and corporate foundations. The speakers shared information on ways to identify and apply for grant funding.

-ee-

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4TH DISTRICT, KENTUCKY

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Please include your email address, as well as the types of grants and federal funding that most interests you. Choices include the United States Departments of Agriculture, Interior, Justice, Labor, Education, Housing and Urban Development, Homeland Security, and Health and Human Services. You also may list the National Endowment for the Arts, National Endowment for the Humanities, Appalachian Regional Commission, Economic Development Administration, and Environmental Protection Agency. If you are unsure of which agencies to choose, please call Jennifer for guidance at (859) 426-0080.

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Thank you again for participating in our first grants workshop. Please don't hesitate to contact me anytime I may be of assistance.

Sincerely,

Geoff Davis
Member of Congress

GD/«initials»

GRANT WORKSHOP AGENDA
Monday, October 17, 2005

10:30 - 11:00   Registration

11:00 - 11:45   Welcome – Congressman Geoff Davis
           Personal Grant Writing Experience - Emily Shelton
           A Perspective on Grants Development for Non-Profits - Linda Young -
               Welcome House of Northern Kentucky

11:45 - 1:00   Lunch

1:00 - 1:45   Breakout Sessions with Federal Agencies
           Please choose one of the following:
             Appalachian Regional Commission / Economic Development
               Administration/ EPA / USDA Rural Development
             U.S. Department of Education -
             U.S. Department of Housing and Urban Development / USDA Rural
               Development
             U.S. Department of Health and Human Services
             U.S. Department of Justice Offices / U.S. Department of Homeland Security
             National Endowment for the Arts / National Endowment for the
               Humanities, Inc.

1:45 - 2:00   Break and Room Change

2:00 - 2:45   Breakout Sessions with State Agencies
           Please choose one of the following:
             Kentucky Arts Council / Kentucky Humanities Council
             Kentucky Department of Education
             Kentucky Office of Homeland Security
             Kentucky Housing Corporation
             Governor's Office of Local Development / Kentucky Infrastructure Authority
             Kentucky Justice and Public Safety Cabinet

2:45 - 3:00   Break and Room Change

3:00 - 4:00   Private and Corporate Foundation Grants Panel Discussion
           Toyota
           Citigroup Foundation
           Ashland Inc.
           5/3 Bank
           UPS Foundation

4:00 - 5:00   Presentation on Basic Grant Writing and Leveraging Non-Cash Assets –
           Tanya Dickinson – Kentucky Justice and Public Safety Cabinet

5:00-5:15   Closing – Jennifer Schmidt – Office of Congressman Geoff Davis

Speakers for 2005 Grant Workshop

Geoff Davis
Member of Congress
277 Buttermilk Pike
Ft. Mitchell, KY 41017
(859) 426-0080
http://geoffdavis.house.gov/

Mrs. Jennifer Biggy Schmidt
Constituent Liaison
277 Buttermilk Pike
Ft. Mitchell, KY 41017
(859) 426-0080

Mrs. Emily Shelton
Grants Consultant, Shelton & Associates
6338 Clovernook Dr
Burlington, KY 41005-9528

Mrs. Linda M. Young
Executive Director
Welcome House of Northern KY, Inc.
205 Pike Street
Covington, KY 41011

FEDERAL

Mr. Kenneth Slone   **CONFIRMED**
State Director
U.S. Department of Agriculture Rural Development
771 Corporate Drive, Suite 200
Lexington, KY 40503
www.rurdev.usda.gov

Mr. Vernon Brown   **CONFIRMED**
Community Programs Director
U.S. Department of Agriculture Rural Development
771 Corporate Drive, Suite 200
Lexington, KY 40503
www.rurdev.usda.gov

Mr. Denver Parks   **CONFRIMED**
Single Family Housing Programs Director
U.S. Department of Agriculture Rural Development

771 Corporate Drive, Suite 200
Lexington, KY 40503
www.rurdev.usda.gov

Mr. Dan Neff   **CONFIRMED**
Director
Location Development District Program
Appalachian Regional Commission
1666 Connecticut Avenue, NW
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Washington, DC 20009-1068
www.arc.gov

Mr. Bob Hunter   **CONFIRMED**
Economic Development Representative
Economic Development Agency
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Ms. Blanca Rodriguez   **CONFIRMED**
Director of Grants Policy and Oversight Staff
U.S. Department of Education
400 Maryland Avenue, SW
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www.ed.gov

Ms. Jeanne Conklin   **CONFIRMED**
National Training Grants Coordinator
Environmental Protection Agency
1200 Pennsylvania Avenue, NW
Washington, DC 20460
http://www.epa.gov/ogd/

Mr. Wayne Brown   **CONFIRMED**
Director of Music and Opera
National Endowment for the Arts
1100 Pennsylvania Avenue, Room 703
Washington, DC 20506
www.nea.gov

Ms. Bonnie Curtin   **CONFIRMED**
Senior Program Officer
Division of Preservation and Access
National Endowment for the Humanities

1100 Pennsylvania Ave., NW
Washington, DC 20506
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Ms. Diane J. Osterhus   **CONFIRMED**
Director, Grants Oversight and Review
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Ms. Liz Conklin   **CONFIRMED**
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Mr. Patrick Gavin   **COMFIRMED**
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Office for Domestic Preparedness
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Ms. Deborah Knight   **CONFIRMED**
Operations Specialist
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Mr. Dave Buchanan   **CONFIRMED**
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Ms. Brenda Hollis   **CONFIRMED**

Program Manager
Office on Violence Against Women
U.S. Department of Justice
800 K Street, NW
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STATE

Ms. Lori Meadows   **CONFIRMED**
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Frankfort KY 40601-1987
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Mr. Petie Day   **CONFIRMED**
Director of Division of Budget
KY Department of Education
Capital Plaza Tower
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Mr. Darryl Thompson   **CONFIRMED**
Branch Manager
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Kentucky Department of Education
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Myralee Smith-Cowley   **CONFIRMED**
Executive Director of the Office of Grants
Governor's Office of Local Development
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Mr. Rick McQuday   **CONFIRMED**
Chief Policy and Administrative Officer
Kentucky Housing Corporation

1231 Louisville Road
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Dr. Virginia Smith   **CONFIRMED**
Director
Kentucky Humanities Council, Inc.
206 East Maxwell Street
Lexington, KY 40508
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Ms. Tanya Dickinson   **CONFIRMED**
Branch Manager
Grants Management Branch
Kentucky Justice Cabinet
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Frankfort, KY 40601
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Mr. John E. Covington, III   **CONFIRMED**
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Ms. Sandy Williams   **CONFIRMED**
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Mr. Joel Schrader   **CONFIRMED**
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PRIVATE

Ms. Debbie George   **CONFIRMED**
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Johnna Reeder Fasold   **CONFIRMED**
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Heidi B. Jark, JD   **CONFRIMED**
Vice President & Manager
The Foundation Office
Fifth Third Bank
38 Fountain Square Plaza MD1090CA
Cincinnati, OH 45263

Ms. Helen Carroll   **CONFIRMED**
Manger of Community Relations
Toyota Motor Manufacturing, North America
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Erlanger, KY 41018

Ms. Dana Nicholson   **CONFIRMED**
Public Affairs
UPS
1400 N. Hurstborn Parkway
Louisville, KY 40223

Technical
Program Evaluation & Leveraging Non-Cash Assets – Tanya Dickinson

Grants 101

A/K/A

The Inside Scoop:
Solicitation to Closeout

Tanya Dickinson
Grants Management Branch
Justice and Public Safety Cabinet

2

Congressman Geoff Davis
Fourth Congressional District, Kentucky

Grants Workshop

Receptions Conference Center
Erlanger, Kentucky
October 17, 2005

1

Deep Thoughts . . . about Grants . . .

FOLLOW THE INSTRUCTIONS!

4

Grants Process Overview

3

How to Find Funding Resources

Look in expected and unexpected places . . .

- All Federal funding resources are announced at:
  - http://www.grants.gov (all federal grants are to be on-line by 2005)
  - Agency websites list funding opportunities
- LOTS of alternative sources on-line:
  - Google "grants", and you get 16.5MILLION items
  - http://www.tgci.com
  - http://www.fdncenter.org
- Contact relevant:
  - Professional associations
  - Professional grant writers
  - Friends
  - Trade organizations
  - Chambers of Commerce
  - Any relevant constituent body

Tips for Writing a Successful Proposal

Before You Begin . . .

- Review the Solicitation
  - Due Dates
  - Rules and Minimum Requirements
  - Additional Information Opportunities
- Obtain Organizational Approval
- Assemble the Players
- Delegate the Tasks

Proposal Sections

- ⌘Project Overview
- ⌘Problem Statement
- ⌘Goals and Objectives
- ⌘Project Design/Methodology
- ⌘Organizational and Management Capabilities
- ⌘Budget and Narrative
- ⌘Appendices

9

Project Overview

- ⌘Executive Summary
- ⌘"Paint a Picture"
- ⌘When to Prepare

10

Problem Statement

- ⌘Understanding of the Problem
- ⌘Review of Relevant Literature
- ⌘Careful Use of Language
- ⌘Position Your Project

11

Goals and Objectives

- ⌘Difference Between Goals and Objectives
- ⌘Overlap
- ⌘Importance of Measurable Objectives

12

SMART Objectives

S – Specific

M – Measurable

A – Accountable

R – Results Oriented

T – Time Bound

14

Goals vs. Objectives

GOALS	OBJECTIVES
Are Broad	Are Narrow
Are General Intentions	Are Precise
Are Abstract	Are Concrete
Are Not Tied to Time Frame	Are Tied to a Timeframe

13

Organizational and Management Capabilities

\#Describe Organization's Capability to Successfully Conduct Project

\#Describe Management Structure and Staffing Plan

\#Staff Time Commitments and Major Tasks

16

Project Design or Methodology

\#How?

\#When?

\#Why?

15

Organizational and Management Capabilities (cont'd)

�֍Resumes of Key Staff

✖Describe Similar Projects Undertaken by the Organization

✖Describe Plan for Consultants

17

Budget and Narrative

✖Complete

✖Detailed

✖Allowable

✖Reasonable

✖Cost Effective in Relation to Proposed Activities

18

A Few Words About Match . . .

✖In-Kind (soft) versus Cash (hard) match

✖Subject to same rules as federal funds

✖Can't match one pot of federal funds with another

19

Common Appendices

✖Dissemination Plan

✖Timelines

✖Letters of Support

✖Evaluation Instrument

20

Proposal Checklist

⌘ Many RFPs include a review document. Use it.

21

Submission . . .

and then what?

22

Peer Review Processes

⌘ External Peer Review

⌘ Reviewed for Technical Merit and Responsiveness to Solicitation

⌘ Peer Reviewers are Subject Matter Experts

⌘ Applications are Screened for Compliance with Basic Minimum Requirements

23

Peer Review Processes (cont'd)

⌘ Multiple Reviewers Read and Rate Each Application

⌘ Review Criteria are Based on Solicitation Requirements

⌘ Reviewers Assign a Numerical Score and Identify Strengths and Weaknesses for Each Criteria
  ☒ Enhancements are Suggested

24

Award Decisions

25

"What do I do with Award Documents?"

- Read the award document and special conditions
  - Project Period
  - Award Amount
  - Program Contact
  - Vendor and Award Numbers
- Have your designated official sign the award documents
- Return them to the Awarding Organization

26

"What do I do if my proposal is rejected?"

- Request reviewer comments
- Try again next time

27

"How do I get my money?"

28

Federal Reporting Requirements

- Financial Status Reports
  - Filed quarterly
  - SF 269 submitted on-line (to USDOJ at **http://grants.ojp.usdoj.gov)**
- Program Progress Reports
  - Submitted semiannually
  - Also filed on-line to (USDOJ on-line at **http://grants.ojp.usdoj.gov)**
- State and Local Governments, Institutions of Higher Education, and Non-Profit Institutions must submit annual Audit Reports to Federal Audit Clearinghouse

29

Use of Funds

- Unallowable Costs include:
  - Lobbying
  - Fundraising
  - Compensation/travel for federal employees
  - Consultant fees above $450/day (without prior approval)
- Information Sources:
  - OMB Circulars: http://www.whitehouse.gov/omb/circulars/index-ffm.html
  - OJP Financial Guide: **http://www.ojp.usdoj.gov/FinGuide/**
  - BJA Guide to Grants: **http://bja.ncjrs.org/g2g/**

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Adjustments to Your Grant

- To request a change to your grant, you need to submit a request, in writing, to your program manager.

31

Adjustments to Your Grant

- Change in project director
- Special condition compliance
- Address changes
- Approval of costs not typically permitted under the grant (e.g., consultant fees above $450/day)
- Sole source justification

32

Adjustments to Your Grant

- Change in project scope/activities
- Budget adjustments
  - If more than 10% of total grant funds are shifted from one category to another
  - Adding funds to a new budget category
- No cost extensions

33

Adjustments to Your Grant

- No Cost Grant Extension . . . .
  - May be requested if funds remain and program activities have not been completed by the end of the project period on the award document
  - Extension request must include:
    - The amount of additional time needed
    - Why the extension is necessary
    - Why the project activities were not completed within the original time period
    - What you intend to do in the extended time
    - Most recent unobligated balance

34

Grant Closeout

- All reports must be up to date
- All program expenses must be obligated by the last day of the project period specified on the award document or as adjusted by a GAN
- All costs must be liquidated (expended) within 90 days after the end of the project period

35

Grant Closeout

- Final Financial Status Report (SF 269A) is due within 120 days of the end of the award
- Final Progress Report is due within 120 days of the end of the award
- Any unobligated funds will be deobligated
- Any funds that were drawn down in excess of expenditures must be returned

36

Grantor Preparation

for the

Solicitation & Award

Processes

37

10 Steps

❄ Strategy Development
❄ Outreach
❄ Request for Proposals
❄ Bidders Conference
❄ Letters of Intent
❄ Receive and Review Proposals
❄ Recommend Funding Plan
❄ Prepare Award Documentation
❄ Announce Awards
❄ Grantee Technical Assistance Workshop

38

Questions?

Tanya L. Dickinson
Branch Manager
Grants Management Branch
Kentucky Justice and Public Safety Cabinet
502/564-3251
502/564-5244(fax)
tanya.dickinson@ky.gov

http://justice.ky.gov/departments/gmb/

39

The End Is Here

Special Thanks to Eileen M. Garry, Deputy
Director, Bureau of Justice Assistance

40

CFDA

The Catalog of Federal
Domestic Assistance

Developing And Writing Grant Proposals

PART ONE: DEVELOPING A GRANT PROPOSAL

Preparation

A successful grant proposal is one that is well-prepared, thoughtfully planned, and concisely packaged. The potential applicant should become familiar with all of the pertinent program criteria related to the Catalog program from which assistance is sought. Refer to the information contact person listed in the Catalog program description before developing a proposal to obtain information such as whether funding is available, when applicable deadlines occur, and the process used by the grantor agency for accepting applications. Applicants should remember that the basic requirements, application forms, information and procedures vary with the Federal agency making the grant award.

Individuals without prior grant proposal writing experience may find it useful to attend a grantsmanship workshop. A workshop can amplify the basic information presented here. Applicants interested in additional readings on grantsmanship and proposal development should consult the references listed at the end of this section and explore other library resources.

INITIAL PROPOSAL DEVELOPMENT

Developing Ideas for the Proposal

When developing an idea for a proposal it is important to determine if the idea has been considered in the applicant's locality or State. A careful check should be made with legislators and area government agencies and related public and private agencies which may currently have grant awards or contracts to do similar work. If a similar program already exists, the applicant may need to reconsider submitting the proposed project, particularly if duplication of effort is perceived. If significant differences or improvements in the proposed project's goals can be clearly established, it may be worthwhile to pursue Federal assistance.

Community Support

Community support for most proposals is essential. Once proposal summary is developed, look for individuals or groups representing academic, political, professional, and lay organizations which may be willing to support the proposal in writing. The type and caliber of community support is critical in the initial and subsequent review phases. Numerous letters of support can be persuasive to a grantor agency. Do not overlook support from local government agencies and public officials. Letters of endorsement detailing exact areas of project sanction and commitment are often requested as part of a proposal to a Federal agency. Several months may be required to develop letters of endorsement since something of value (e.g., buildings, staff, services) is sometimes negotiated between the parties involved.

Many agencies require, in writing, affiliation agreements (a mutual agreement to share services between agencies) and building space commitments prior to either grant approval or award. A useful method of generating community support may be to hold meetings with the top decision makers in the community who would be concerned with the subject matter of the proposal. The forum for discussion may include a query into the merits of the proposal, development of a contract of support for the

proposal, to generate data in support of the proposal, or development of a strategy to create proposal support from a large number of community groups.

Identification of a Funding Resource

A review of the Objectives and Uses and Use Restrictions sections of the Catalog program description can point out which programs might provide funding for an idea. Do not overlook the related programs as potential resources. Both the applicant and the grantor agency should have the same interests, intentions, and needs if a proposal is to be considered an acceptable candidate for funding.

Once a potential grantor agency is identified, call the contact telephone number identified in Information Contacts and ask for a grant application kit. Later, get to know some of the grantor agency personnel. Ask for suggestions, criticisms, and advice about the proposed project. In many cases, the more agency personnel know about the proposal, the better the chance of support and of an eventual favorable decision. Sometimes it is useful to send the proposal summary to a specific agency official in a separate cover letter, and ask for review and comment at the earliest possible convenience. Always check with the Federal agency to determine its preference if this approach is under consideration. If the review is unfavorable and differences cannot be resolved, ask the examining agency (official) to suggest another department or agency which may be interested in the proposal. A personal visit to the agency's regional office or headquarters is also important. A visit not only establishes face-to-face contact, but also may bring out some essential details about the proposal or help secure literature and references from the agency's library.

Federal agencies are required to report funding information as funds are approved, increased or decreased among projects within a given State depending on the type of required reporting. Also, consider reviewing the Federal Budget for the current and budget fiscal years to determine proposed dollar amounts for particular budget functions.

The applicant should carefully study the eligibility requirements for each Federal program under consideration (see the Applicant Eligibility section of the Catalog program description). The applicant may learn that he or she is required to provide services otherwise unintended such as a service to particular client groups, or involvement of specific institutions. It may necessitate the modification of the original concept in order for the project to be eligible for funding. Questions about eligibility should be discussed with the appropriate program officer.

Deadlines for submitting applications are often not negotiable. They are usually associated with strict timetables for agency review. Some programs have more than one application deadline during the fiscal year. Applicants should plan proposal development around the established deadlines.

Getting Organized to Write the Proposal

Throughout the proposal writing stage keep a notebook handy to write down ideas. Periodically, try to connect ideas by reviewing the notebook. Never throw away written ideas during the grant writing stage. Maintain a file labeled "Ideas" or by some other convenient title and review the ideas from time to time. The file should be easily accessible. The gathering of documents such as articles of incorporation, tax exemption certificates, and bylaws should be completed, if possible, before the writing begins.

REVIEW

Criticism

At some point, perhaps after the first or second draft is completed, seek out a neutral third party to review the proposal working draft for continuity, clarity and reasoning. Ask for constructive criticism at this point, rather than wait for the Federal grantor agency to volunteer this information during the review cycle. For example, has the writer made unsupported assumptions or used jargon or excessive language in the proposal?

Signature

Most proposals are made to institutions rather than individuals. Often signatures of chief administrative officials are required. Check to make sure they are included in the proposal where appropriate.

Neatness

Proposals should be typed, collated, copied, and packaged correctly and neatly (according to agency instructions, if any). Each package should be inspected to ensure uniformity from cover to cover. Binding may require either clamps or hard covers. Check with the Federal agency to determine its preference. A neat, organized, and attractive proposal package can leave a positive impression with the reader about the proposal contents.

Mailing

A cover letter should always accompany a proposal. Standard U.S. Postal Service requirements apply unless otherwise indicated by the Federal agency. Make sure there is enough time for the proposals to reach their destinations. Otherwise, special arrangements may be necessary. Always coordinate such arrangements with the Federal grantor agency project office (the agency which will ultimately have the responsibility for the project), the grant office (the agency which will coordinate the grant review), and the contract office (the agency responsible for disbursement and grant award notices), if necessary.

PART TWO: WRITING THE GRANT PROPOSAL

The Basic Components of a Proposal

There are eight basic components to creating a solid proposal package: (1) the proposal summary; (2) introduction of organization; (3) the problem statement (or needs assessment); (4) project objectives; (5) project methods or design; (6) project evaluation; (7) future funding; and (8) the project budget. The following will provide an overview of these components.

The Proposal Summary: Outline of Project Goals

The proposal summary outlines the proposed project and should appear at the beginning of the proposal. It could be in the form of a cover letter or a separate page, but should definitely be brief — no longer than two or three paragraphs. The summary would be most useful if it were prepared after the proposal has been developed in order to encompass all the key summary points necessary to communicate the objectives of the project. It is this document that becomes the cornerstone of your proposal, and the initial impression it gives will be critical to the success of your venture. In many cases, the summary will be the first part of the proposal package seen by agency officials and very possibly could be the only part of the package that is carefully reviewed before the decision is made to consider the project any further.

The applicant must select a fundable project which can be supported in view of the local need. Alternatives, in the absence of Federal support, should be pointed out. The influence of the project both during and after the project period should be explained. The consequences of the project as a result of funding should be highlighted.

Introduction: Presenting a Credible Applicant or Organization

The applicant should gather data about its organization from all available sources. Most proposals require a description of an applicant's organization to describe its past and present operations. Some features to consider are:

- A brief biography of board members and key staff members.

- The organization's goals, philosophy, track record with other grantors, and any success stories.

- The data should be relevant to the goals of the Federal grantor agency and should establish the applicant's credibility.

The Problem Statement: Stating the Purpose at Hand

The problem statement (or needs assessment) is a key element of a proposal that makes a clear, concise, and well-supported statement of the problem to be addressed. The best way to collect information about the problem is to conduct and document both a formal and informal needs assessment for a program in the target or service area. The information provided should be both factual and directly related to the problem addressed by the proposal. Areas to document are:

- The purpose for developing the proposal.

- The beneficiaries – who are they and how will they benefit.

- The social and economic costs to be affected.

- The nature of the problem (provide as much hard evidence as possible).

- How the applicant organization came to realize the problem exists, and what is currently being done about the problem.

- The remaining alternatives available when funding has been exhausted. Explain what will happen to the project and the impending implications.

- Most importantly, the specific manner through which problems might be solved. Review the resources needed, considering how they will be used and to what end.

There is a considerable body of literature on the exact assessment techniques to be used. Any local, regional, or State government planning office, or local university offering course work in planning and evaluation techniques should be able to provide excellent background references. Types of data that may be collected include: historical, geographic, quantitative, factual, statistical, and philosophical information, as well as studies completed by colleges, and literature searches from public or university libraries. Local colleges or universities which have a department or section related to the proposal topic may help determine if there is interest in developing a student or faculty project to conduct a needs assessment. It may be helpful to include examples of the findings for highlighting in the proposal.

Project Objectives: Goals and Desired Outcome

Program objectives refer to specific activities in a proposal. It is necessary to identify all objectives related to the goals to be reached, and the methods to be employed to achieve the stated objectives. Consider quantities or things measurable and refer to a problem statement and the outcome of proposed activities when developing a well-stated objective. The figures used should be verifiable. Remember, if the proposal is funded, the stated objectives will probably be used to evaluate program progress, so be realistic. There is literature available to help identify and write program objectives.

Program Methods and Program Design: A Plan of Action

The program design refers to how the project is expected to work and solve the stated problem. Sketch out the following:

- The activities to occur along with the related resources and staff needed to operate the project (inputs).

- A flow chart of the organizational features of the project. Describe how the parts interrelate, where personnel will be needed, and what they are expected to do. Identify the kinds of facilities, transportation, and support services required (throughputs).

- Explain what will be achieved through 1 and 2 above (outputs); i.e., plan for measurable results. Project staff may be required to produce evidence of program performance through an examination of stated objectives during either a site visit by the Federal grantor agency and or grant reviews which may involve peer review committees.

- It may be useful to devise a diagram of the program design. For example, draw a three column block. Each column is headed by one of the parts (inputs, throughputs and outputs), and on the left (next to the first column) specific program features should be identified (i.e., implementation, staffing, procurement, and systems development). In the grid, specify something about the program design, for example, assume the first column is labeled inputs and the first row is labeled staff. On the grid one might specify under inputs five nurses to operate a child care unit. The throughput might be to maintain charts, counsel the children, and set up a daily routine; outputs might be to discharge 25 healthy children per week. This type of procedure will help to conceptualize both the scope and detail of the project.

- Wherever possible, justify in the narrative the course of action taken. The most economical method should be used that does not compromise or sacrifice project quality. The financial expenses associated with performance of the project will later become points of negotiation with the Federal program staff. If everything is not carefully justified in writing in the proposal, after negotiation with the Federal grantor agencies, the approved project may resemble less of the original concept. Carefully consider the pressures of the proposed implementation, that is, the time and money needed to acquire each part of the plan. A Program Evaluation and Review Technique (PERT) chart could be useful and supportive in justifying some proposals.

- Highlight the innovative features of the proposal which could be considered distinct from other proposals under consideration.

- Whenever possible, use appendices to provide details, supplementary data, references, and information requiring in-depth analysis. These types of data, although supportive of the proposal, if included in the body of the design, could detract from its readability. Appendices provide the proposal reader with immediate access to details if and when clarification of an idea, sequence or conclusion is required. Time tables, work plans, schedules, activities, methodologies, legal papers, personal vitae, letters of support, and endorsements are examples of appendices.

Evaluation: Product and Process Analysis

The evaluation component is two-fold: (1) product evaluation; and (2) process evaluation. Product evaluation addresses results that can be attributed to the project, as well as the extent to which the project has satisfied its desired objectives. Process evaluation addresses how the project was conducted, in terms of consistency with the stated plan of action and the effectiveness of the various activities within the plan.

Most Federal agencies now require some form of program evaluation among grantees. The requirements of the proposed project should be explored carefully. Evaluations may be conducted by an internal staff member, an evaluation firm or both. The applicant should state the amount of time needed to evaluate, how the feedback will be distributed among the proposed staff, and a schedule for review and comment for this type of communication. Evaluation designs may start at the beginning, middle or end of a project, but the applicant should specify a start-up time. It is practical to submit an evaluation design at the start of a project for two reasons:

- Convincing evaluations require the collection of appropriate data before and during program operations; and,

- If the evaluation design cannot be prepared at the outset then a critical review of the program design may be advisable.

Even if the evaluation design has to be revised as the project progresses, it is much easier and cheaper to modify a good design. If the problem is not well defined and carefully analyzed for cause and effect relationships then a good evaluation design may be difficult to achieve. Sometimes a pilot study is needed to begin the identification of facts and relationships. Often a thorough literature search may be sufficient.

Evaluation requires both coordination and agreement among program decision makers (if known). Above all, the Federal grantor agency's requirements should be highlighted in the evaluation design. Also, Federal grantor agencies may require specific evaluation techniques such as designated data formats (an existing information collection system) or they may offer financial inducements for voluntary participation in a national evaluation study. The applicant should ask specifically about these points. Also, consult the Criteria For Selecting Proposals section of the Catalog program description to determine the exact evaluation methods to be required for the program if funded.

Future Funding: Long-Term Project Planning

Describe a plan for continuation beyond the grant period, and/or the availability of other resources necessary to implement the grant. Discuss maintenance and future program funding if program is for construction activity. Account for other needed expenditures If program includes purchase of equipment.

The Proposal Budget: Planning the Budget

Funding levels in Federal assistance programs change yearly. It is useful to review the appropriations over the past several years to try to project future funding levels (see Financial Information section of the Catalog program description).

However, it is safer to never anticipate that the income from the grant will be the sole support for the project. This consideration should be given to the overall budget requirements, and in particular, to budget line items most subject to inflationary pressures. Restraint is important in determining inflationary cost projections (avoid padding budget line items), but attempt to anticipate possible future increases.

Some vulnerable budget areas are: utilities, rental of buildings and equipment, salary increases, food, telephones, insurance, and transportation. Budget adjustments are sometimes made after the grant award, but this can be a lengthy process. Be certain that implementation, continuation and phase-down costs can be met. Consider costs associated with leases, evaluation systems, hard/soft match requirements, audits, development, implementation and maintenance of information and accounting systems, and other long-term financial commitments.

A well-prepared budget justifies all expenses and is consistent with the proposal narrative. Some areas in need of an evaluation for consistency are: (1) the salaries in the proposal in relation to those of the applicant organization should be similar; (2) if new staff persons are being hired, additional space and equipment should be considered, as necessary; (3) if the budget calls for an equipment purchase, it should be the type allowed by the grantor agency; (4) if additional space is rented, the increase in insurance should be supported; (5) if an indirect cost rate applies to the proposal, the division between direct and indirect costs should not be in conflict, and the aggregate budget totals should refer directly to the approved formula; and (6) if matching costs are required, the contributions to the matching fund should be taken out of the budget unless otherwise specified in the application instructions.

It is very important to become familiar with Government-wide circular requirements. The Catalog identifies in the program description section (as information is provided from the agencies) the particular circulars applicable to a Federal program, and summarizes coordination of Executive Order 12372, "Intergovernmental Review of Programs" requirements in Appendix I. The applicant should thoroughly

review the appropriate circulars since they are essential in determining items such as cost principles and conforming with Government guidelines for Federal domestic assistance.

GUIDELINES AND LITERATURE

United States Government Manual
Superintendent of Documents
U.S. Government Printing Office
Washington, DC 20402

OMB Circular Nos. A-87, A-102, A-110, and A-133, and Executive Order 12372:
Publications Office
Office of Administration
Room 2200, 725 Seventeenth Street, NW.
Washington, DC 20503

Government Printing Office (GPO) Resources

The government documents identified above as available from the GPO can be requested (supply the necessary identifying information) by writing to:

Superintendent of Documents
Government Printing Office
Washington, DC 20402

Regional and Federal Depository Libraries

Regional libraries can arrange for copies of Government documents through an interlibrary loan. All Federal Depository Libraries will receive copies of the Catalog directly. A list of depository and regional libraries is available by writing: Chief, Library Division, Superintendent of Documents, Stop SLL, Washington, DC 20402.

Helpful Websites

Identifying Grants:

Grants.gov
Grants.gov allows organizations to electronically find and apply for competitive grant opportunities from all Federal grant-making agencies. Grants.gov is the single access point for over 1000 grant programs offered by the 26 Federal grant-making agencies.
www.grants.gov

Catalog for Domestic Assistance
This web site gives you access to a database of all Federal programs available to State and local governments, public and private profit and nonprofit organizations and institutions.
www.cfda.gov

Federal Register
The Federal Register is published by the Office of the Federal Register, National Archives and Records Administration (NARA) each day. This document serves as the written notice of Federal rules, proposed rules, and notices of Federal agencies and organizations. Requests or notification of grants are included in this publication.
www.gpoaccess.gov/fr/index.html

FedGrants
This site allows grantors to post solicitations for grants applications and allows applicants to search for grants. http://fedgrants.gov/Applicants/index.html

Applying for Grants:

The Foundation Center
A website that provides information about private funding sources, the grantseeking process, guidelines on writing a grant proposal, addresses of State libraries with grants reference collections, and links to other useful Internet Web sites. The Center maintains a comprehensive database on foundations; produces print, Web, and CD-ROM directories and guides; conducts research and publishes studies in the field; and offers a variety of training and educational seminars.
www.foundationcenter.org/

General Information:

Executive Branch
This website is maintained by the Library of Congress and contains a directory of web links to the Executive Branch including the agencies, departments, independent agencies, and boards and commissions.
www.loc.gov/rr/news/fedgov.html

Congressman Geoff Davis Grant Workshop Evaluation

Please take the time to complete this evaluation so we can better serve you in the future.

1. Please rate each of the portions of the grant workshop from 1-10:
   a. Opening Session (including Grant Writers and Non-Profits): _____
   b. Breakout Sessions with Federal Agencies (1st Session):   _____
   c. Breakout Sessions with State Agencies (2nd Session):   _____
   d. Private and Corporate Foundation Grants: _____
   e. Grants 101 Presentation: _____

2. Did you find the grant workshop folder to be helpful? Was there additional information that was not provided that would benefit you?

   _____

   _____

   _____

3. Did you feel that the breakout sessions were long enough to accommodate all of your questions? Were the speakers' comments and presentations helpful?

   _____

   _____

   _____

4. Please tell us how you heard about the Grant Workshop.

   _____

5. Would you change any portion of the program? If so, explain.

   _____

   _____

   _____

6. Would you attend this event in the future? Would you recommend it to others?

   _____

   _____

   _____

7. Please provide us with any additional comments regarding the Grant Workshop.

   _____

   _____

   _____

   _____

DIRECTORY OF FEDERAL AGENCIES

Environmental Protection Agency
401 M Street, SW
Washington, DC 20460
(202) 272-0167
www.epa.gov

Region 4 Office (EPA)
Sam Nunn Atlanta Federal Center
61 Forsyth Street, SW
Atlanta, GA 30303-3104
(800) 241-1754

Federal Emergency Management
Agency
500 C Street, SW
Washington, DC 20472
(202) 566-1600
www.fema.gov

Region IV Office (FEMA)
3003 Chamblee-Tucker Road
Atlanta, GA 30341
(770) 220-5200

Federal Trade Commission
600 Pennsylvania Ave., NW
Washington, DC 20580
www.ftc.gov

Midwest Regional Office (FTC)
55 East Monroe Street, Suite 1860
Chicago, IL 60603-5701
(877) 382-4357

General Services Administration
1800 F Street, NW
Washington, DC 20405
(800) 488-3111
www.gsa.gov

Region 4 Office (GSA)
77 Forsyth Street Suite 600
Atlanta, GA 30303
(404) 331-3200

Small Business Administration
409 Third Street, SW
Washington, DC 20416
(800) U-ASK-SBA
www.sba.gov

Kentucky District Office (SBA)
600 Dr. MLK Jr. PL
Louisville, KY 40202
(502) 582-5971
http://www.sba.gov/ky/

Social Security Administration
6401 Security Blvd., #4C5
Baltimore, MD 21235
(800) 772-1213
www.ssa.gov

Region 4 Office (SSA)
61 Forsyth St. SW Suite 23T29
Atlanta, GA 30303-8907
(800) 772-1213

DIRECTORY OF FEDERAL DEPARTMENTS

U.S Department of Agriculture
14th and Independence Ave., SW
Washington, DC 20250
(202) 720-2791
www.usda.gov

U.S. Department of Commerce
15th & Constitution, NW
Washington, DC 20230
(202) 482-2112
www.doc.gov

U.S. Department of Defense
OASD (PA)/DPC
1400 Defense Pentagon, Room IE757
Washington, DC 20301-1400
www.defenselink.mil

U.S. Department of Education
400 Maryland Ave., SW
Washington, DC 20202-0498
(800) USA-LEARN
www.ed.gov

U.S. Department of Energy
1000 Independence Ave., SW
Washington, DC 20585
(202) 586-5575
home.doe.gov

U.S. Department of Health and Human
Services
200 Independence Ave., SW
Washington, DC 20201
(202) 619-0257
www.dhhs.gov

U.S. Department of Housing and Urban
Development
451 7th Street, SW
Washington, DC 20410
(202) 708-1112
www.hud.gov

U.S. Department of Homeland Security
Washington, D.C. 20528
202-282-8000
http://www.dhs.gov/dhspublic/

U.S. Department of the Interior
1849 C Street, NW
Washington, DC 20240
(202) 208-3100
www.doi.gov

U.S. Department of Justice
950 Pennsylvania Ave., NW
Washington, DC 20530-0001
(202) 514-2000
www.usdoj.gov

U.S. Department of Labor
200 Constitution Ave., NW
Washington, DC 20210
(866) 4-USA-DOL
www.dol.gov

U.S. Department of Transportation
400 7th Street, SW
Washington, DC 20590
(202) 366-4000
www.dot.gov

U.S. Department of Veterans Affairs
810 Vermont Ave., NW
Washington, DC 20420
(800) 827-1000
www.va.gov

DIRECTORY OF NON-GOVERNMENTAL ORGANIZATIONS

Chronicle of Philanthropy
1255 23rd Street, NW
Washington, DC 20037
(800) 728-2819
www.philanthropy.com

Council on Foundations
1828 L Street, NW
Washington, DC 20036
(202) 466-6512
www.cof.org

Foundation Center
79 5th Avenue
New York, NY 10003
(212) 620-4230
(800) 424-9836
www.fdncenter.org

Funding Information Center
329 S. Henderson
Fort Worth, TX 76104
(817) 334-0228
www.fic-ftw.org

The Grantsmanship Center
1125 W. 6th Street, 5th Floor
P.O. Box 17220
Los Angeles, CA 90017
(213) 482-9860
www.tgci.com

Independent Sector
1200 18th Street, NW, Suite 200
Washington, DC 20036
(202) 467-6100
www.independentsector.org

National Council of Non-Profit
Associations
1900 L Street, NW, Suite 605
Washington, DC 20036
(202) 962-0322
www.ncna.org

Non-Profit Gateway
www.nonprofit.gov

Center on Philanthropy and Civil
Society
365 Fifth Avenue, 5th Floor
New York, NY 10016
(212) 817-2010
www.philanthropy.org

Support Center for Non-profit
Management
706 Mission Street, 5th Floor
San Francisco, CA 94103
(415) 541-9000
www.supportcenter.org

Faith-Based Offices in Federal Agencies

White House Office of Faith Based and Community Initiatives
The White House
1600 Pennsylvania Avenue NW
Washington, DC 20500
202-456-1414
www.fbci.gov

Health and Human Services, The Center for Faith-Based and Community Initiatives
The U.S. Department of Health and Human Services
200 Independence Avenue, S.W.
Washington, D.C. 20201
Telephone: 202-619-0257
Toll Free: 1-877-696-6775
www.hhs.gov/fbci

Housing and Urban Development Faith-Based and Community Initiatives
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Glossary

Administrative action: A post-award administrative request to modify the conditions of the original grant. An administrative action may be monetary or non-monetary and may require prior approval.

Administrative regulations: Regulations that implement 1) guidance from OMB contained in circulars that apply to the administration of all federal grants and cooperative agreements, 2) Presidential executive orders (where regulation is necessary), and 3) legislation that affects all applicants for or recipients of federal grants and cooperative agreements;

Allowable costs: Expenditures under a grant project that are specifically permitted (or not specifically prohibited), by law, regulation, or guidance from the Office of Management and Budget, federal accounting standards, or other authoritative sources.

Application Notice: A notice published in the *Federal Register* and posted on the Department's Web site that invites applications for one or more discretionary grant or cooperative agreement competitions, gives basic program and fiscal information on each competition, informs potential applicants when and where they can obtain application packages, and cites the deadline date for a particular competition.

Appropriations legislation: A law passed by Congress to provide a certain level of funding for a grant program in a given year.

Assets: The amount of capital or principal — money, stocks, bonds, real estate, or other resources — controlled by a foundation or corporate giving program. Generally, assets are invested and the resulting income is used to make grants.

Assurances: A listing of a variety of requirements, found in different federal laws, regulations, and executive orders, that applicants agree in writing to observe as a condition of receiving federal assistance.

Authorizing legislation: A law passed by the Congress that establishes or continues a grant program.

Beneficiary: In philanthropic terms, the donee or grantee receiving funds from a foundation or corporate giving program is the beneficiary, although society may benefit as well.

Budget period: An interval of time into which a project period is divided for budgetary purposes, usually twelve months.

Catalog of Federal Domestic Assistance: Publication and database produced by the General Services Administration that lists the domestic assistance programs of all federal agencies and gives information about a program's authorization, fiscal details, accomplishments, regulations, guidelines, eligibility requirements, information contacts, and application and award process; also called the "CFDA."

CD-ROM: Acronym for Compact Disk-Read Only Memory. CD-ROMs are high-capacity computer disks that allow publishers and other information providers to distribute large amounts of information in a searchable format.

Certification: A statement, signed by an applicant or grantee as a prerequisite for receiving federal funds, that it 1) meets or will adhere to certain conditions and 2) will undertake or not undertake certain actions.

Code of Federal Regulations (CFR): Compilation of all final regulations issued by federal agencies and published annually by the National Archives and Records Administration. The CFR is divided into numbered titles.

Community foundation: A 501(c)(3) organization that makes grants for charitable purposes in a specific community or region. The funds available to a community foundation are usually derived from many donors and held in an endowment that is independently administered; income earned by the endowment is then used to make grants. Although a community foundation may be classified by the IRS as a private foundation, most are public charities and are thus eligible for maximum tax-deductible contributions from the general public.

Company-sponsored foundation: (also referred to as a corporate foundation): A private foundation whose assets are derived primarily from the contributions of a for-profit business. While a company-sponsored foundation may maintain close ties with its parent company, it is an independent organization with its own endowment and as such is subject to the same rules and regulations as other private foundations.

Continuation award: Additional funding awarded to the same grant for a budget period following the initial budget period of a multi-year discretionary grant or cooperative agreement.

Cooperative venture: A joint effort between or among two or more grantmakers. Cooperative venture partners may share in funding responsibilities or contribute information and technical resources.

Deadline date: The date by which an applicant must submit a discretionary grant or cooperative agreement application for it to be considered for funding by the Department. Under many competitions, applicants must mail their paper applications by midnight on the deadline date. Under other competitions, the Department must receive the application by the deadline date. Application packages and notices published in the *Federal Register* for a particular competition indicate the deadline date and time for the submission of paper and electronic applications.

Direct costs: Direct costs are those items in a grant project that can be identified specifically with a particular final cost objective. Examples of direct costs are compensation of employees for the time devoted and identified specifically to the performance of grant activities, cost of materials acquired, consumed, or expended specifically for the purpose of the grant, equipment and other approved capital expenditures, and travel expenses incurred specifically to carry out the activities of a grant project.

Discretionary grant: An award of financial assistance in the form of money, or property in lieu of money, by the federal government to an eligible grantee, usually made on the basis of a competitive review process.

Donee: The recipient of a grant. (Also known as the grantee or the beneficiary.)

Donor: An individual or organization that makes a grant or contribution to a donee. (Also known as the grantor.)

Expenditure responsibility: In general, when a private foundation makes a grant to an organization that is not classified by the IRS as a "public charity," the foundation is required by law to provide some assurance that the funds will be used for the intended charitable purposes. Special reports on such grants must be filed with the IRS. Most grantee organizations are public charities and many foundations do not make "expenditure responsibility" grants.

Federal Register— A daily compilation of federal proposed and final regulations, legal notices, presidential proclamations and executive orders, federal agency documents having general applicability and legal effect, documents required to be published by act of Congress, and other federal agency documents of public interest; prepared by the National Archives and Records Administration for public distribution by the Government Printing Office; publication of record for the Department's regulations.

Fiscal sponsorship: Affiliation with an existing nonprofit organization for the purpose of receiving grants. Grantseekers may either apply for federal tax-exempt status or affiliate with a nonprofit sponsor.

501(c)(3): The section of the tax code that defines nonprofit, charitable, tax-exempt organizations; 501(c)(3) organizations are further defined as public charities, private operating foundations, and private non-operating foundations.

Form 990-PF: The public record information return that all private foundations are required by law to submit annually to the Internal Revenue Service (IRS).

Form 990: The information return that public charities file with the Internal Revenue Service (IRS).

General/operating support: A grant made to further the general purpose or work of an organization, rather than for a specific purpose or project; also called an unrestricted grant or basic support.

Independent foundation: A grantmaking organization usually classified by the IRS as a private foundation. Independent foundations may also be known as family foundations, general purpose foundations, special purpose foundations, or private non-operating foundations.

Indirect costs: Costs of an organization incurred for common or joint objectives, which cannot be readily and specifically identified with a particular grant project or other institutional activity (i.e., electricity, janitorial services).

In-kind contribution: A contribution of equipment, supplies, or other tangible resource, as distinguished from a monetary grant. Some corporate contributors may also donate the use of space or staff time as an in-kind contribution.

Letter of inquiry / Letter of intent: A brief letter outlining an organization's activities and its request for funding that is sent to a prospective donor in order to determine whether it would be appropriate to submit a full grant proposal. Many grantmakers prefer to be contacted in this way before receiving a full proposal.

Notice of proposed rulemaking (NPRM): An announcement published in the Federal Register of proposed new regulations or modifications to existing regulations; the first stage in the process of creating or modifying regulations.

Office of Management and Budget (OMB): A branch of the Executive Office of the President. OMB helps the president formulate spending plans; evaluates the effectiveness of agency programs, policies, and procedures; assesses competing funding demands among agencies; and sets funding priorities. OMB ensures that agency reports, rules, testimony, and proposed legislation are consistent with the president's budget and with administration policies.

In addition, OMB oversees and coordinates the administration's procurement, financial management, information management, and regulatory policies. In each of these areas, OMB's role is to help improve administrative management, to develop better performance measures and coordinating mechanisms, and to reduce any unnecessary burdens on the public.

OMB Circulars: Administrative policy documents issued by OMB that give instruction to federal agencies on a variety of topics, including the administration of federal grants and cooperative agreements.

Program regulations: Regulations that implement legislation passed by Congress to authorize a specific grant program; they generally include applicant and participant eligibility criteria, nature of activities funded, allowability of certain costs, selection criteria under which applications will be selected for funding, and other relevant information.

Program-related investment (PRI): A loan or other investment (as distinguished from a grant) made by a foundation to another organization for a project related to the foundation's philanthropic purposes and interests.

Proposal: A written application, often accompanied by supporting documents, submitted to a foundation or corporate giving program in requesting a grant. Most foundations and corporations do not use printed application forms but instead require written proposals; others prefer preliminary letters of inquiry prior to a formal proposal. Consult published guidelines.

Public charity: A nonprofit organization that qualifies for tax-exempt status under section 501(c)(3) of the IRS code. Public charities are the recipients of most foundation and corporate grants. Some public charities also make grants.

RFP: An acronym for Request for Proposal. When the government issues a new contract or grant program, it sends out RFPs to agencies that might be qualified to participate. The RFP lists project specifications and application procedures. While an increasing number of foundations use RFPs in specific fields, most still prefer to consider proposals that are initiated by applicants.

Set-asides: Funds set aside by a foundation for a specific purpose or project that are counted as qualifying distributions toward the foundation's annual payout requirement. Amounts for the project must be paid within five years of the first set-aside.

Tax-exempt: Refers to organizations that do not have to pay taxes such as federal or state corporate tax or state sales tax. Individuals who make donations to such organizations may be able to deduct these contributions from their income tax.